

## SECTION 1 – Individual Tax Return ENGAGEMENT TERMS (Required Acknowledgment)

### Scope of Engagement

This engagement includes preparation and electronic filing of one (1) basic federal individual income tax return (Form 1040).

For complex tax returns involving any of the following, please schedule a consultation to get started:

- Entity returns (1065, 1120, 1120S)
- Complex Schedule C (employees or inventory)
- Multi-state complex filings
- Rental depreciation analysis
- Audit representation
- Tax planning services
- Prior-year amended returns unless separately agreed
- Cryptocurrency trading

This engagement is limited to the current tax year only. For prior year tax returns please schedule a call.

### Taxpayer Responsibilities

You agree to:

- Provide complete and accurate information
- Upload all required documentation
- Review the completed return before signing
- Retain copies of your tax records

TaxnBooks4U relies solely on information provided by you.

**Confidentiality** All tax return information is protected under IRC §7216 and will not be shared with any third party, including referring organizations, without written consent.

### Required Acknowledgment

I acknowledge and agree to the terms of this limited engagement.

Electronic Signature Required

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse Signature (if MFJ): \_\_\_\_\_ Date: \_\_\_\_\_